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Wealthtech Weekly

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By Rob Burgess
Reporter

For the latest edition of "Show Me Your Stack," I spoke with Tony Blagrove, who, in 2023, founded Traveka Wealth, an independent RIA in the heart of Silicon Valley. He told me when it came to assembling the tech stack for his new venture, AI notetakers were at the top of his list.

And he's not through experimenting, either.

Do you use these tools? Let me know — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

TOP STORIES

SHOW ME YOUR STACK

Silicon Valley RIA bets on early AI adoption: Show Me Your Stack

When Tony Blagrove, founder and CEO of Traveka Wealth in Los Altos, California, started his independent RIA 18 months ago, his first order of business was being an "early adopter" of these emerging tools.

- **Women clients want clarity, not jargon. Here's how to deliver**
  Women are gaining trillions in assets every year. Advisors who want to be recommended by women clients to other women to manage it should learn what not to say.
- **How transitioning advisors use tech to retain clients**
  Around 10% of advisors anticipate transitioning their practice this year, either through consolidation or individual decisions to move firms, according to a new Cerulli study.
- **Raymond James wealth assets up as advisor recruiting surges**

The large St. Petersburg, Florida-based wealth management firm claimed its best advisor recruiting figures since the global financial crisis, though it didn't cite specifics.

- **Should collectible cars drive an investment portfolio?**
  While the right limited production vehicle could go sell many millions at auction, the market remains volatile.

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